JAGKSON HOLE TRAVELAND TOURIS M BOARD

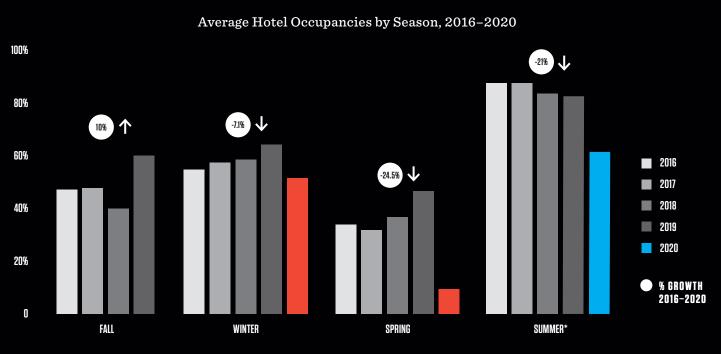
ANNUAL REPORT FISCAL YEAR 2020 07.01.19—06.30.20





Jackson Hole is more than a destination. We're a community and our ultimate goal is to create a sustainable economy where families can live yearround. Tourism is a big part of our economy, but tourism needs to be consistent and manageable.

With the emergence of COVID-19 in March, we had to make a quick pivot from our regular Stay Wild messaging to put the safety of our locals and tourists first. Our tourism numbers dropped, but in anticipation of the pent up demand for travel to the great outdoors, we launched our safety campaign designed to address proper health etiquette. We introduced our 3Cs campaign: Stay Clean, Careful, Connected.



RED INDIGATES IMPACT FROM GOVID-19 *Summer 2020 Occupancy numbers estimated Source: Destimetrics

WE'RE COMMITTED TO YOUR SAFETY.



CLEAN

Wash your hands. Sneeze into your elbow, not your hands.

CAREFUL

Wear a mask or cloth covering and practice social distancing.



CONNECTED

Stay informed with the most up-to-date info at JHcovid.com.



3CS CAMPAIGN. SEE MORE HIGHLIGHTS ON PAGE 33.

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A MESSAGE FROM OUR CHAIRMAN

Welcome to the fifth edition of the Jackson Hole Travel & Tourism Board (JHTTB) annual report. As we entered our new fiscal year, tourism was strong. Promotional efforts in the fall and winter were proving effective in filling excess capacity to secure a more stable, year-round economy. Everything changed on March 11, 2020, when the World Health Organization declared the novel coronavirus a global pandemic. On March 15, Jackson Hole Mountain Resort ceased operations. The Teton County public health director asked people not to travel to Jackson at this time to curb the spread of the virus. The JHTTB followed suit in issuing a "Stay at Home for Now" press release in recognition that tourism needed to be put on pause to prioritize the health of our residents. The national parks closed and the community locked down. The efforts worked from a health and safety perspective but as you will see in this report, lodging tax revenues declined in the spring.

The JHTTB enlisted our agency partner to gain insights and learnings on traveler sentiment. We learned that there was a growing demand to travel specifically to the great outdoors and the national parks. With these insights, the JHTTB quickly pivoted from a focus on promoting tourism in the winter and shoulder months to a focus on tourism management this summer. We created a safety campaign, Responsibly Wild, Clean, Careful and Connected, recognizing that without preserving the safety of our community, our workforce and our visitors, tourism would not be viable. The campaign gained recognition throughout the state and region as other gateway communities adopted the Clean, Careful, Connected messaging. This report illustrates the effects of our early campaign efforts and spending through the end of our fiscal, June 30, 2020. The report highlights in RED, areas affected by the Coronavirus. This includes spring lodging tax collections, spring events that were cancelled, spring airline seats unsold, and hotel occupancies that dropped off. Despite this, the overall lodging tax collections for fiscal '20 were only down .13% or \$10,000 from last year.

The board will continue promoting the Responsibly Wild campaign, while closely monitoring demand going forward. Assets are available for demand-focused marketing if visitation weakens and to provide safety messaging until the threat of COVID-19 has subsided. The board continues to steward destination marketing in a manner that is consistent with the values of the community. With the understanding that this pandemic will most likely continue through the winter, we will closely monitor the situation with the ability to pivot and provide the most appropriate messaging given the state of affairs.

We hope you take a moment to review this report to learn about how the JHTTB is deploying lodging tax funds to further the vitality of our economy, community and culture while keeping the health and safety of our community as the number one priority.

Regards,

Brian Gallagher, Chairman Jackson Hole Travel & Tourism Board

TRAVEL & TOURISM AT Work for teton county



8,860 TRAVEL-GENERATED JOBS

\$67.3 MILLION TRAVEL-GENERATED TAXES

In 2019, Teton County welcomed 1,865,000 overnight visitors to the area.

Domestic and international travelers spent **\$1.28 billion** in Teton County and generated **\$34.4 million** in state and local taxes. This tax revenue is used to support public infrastructure such as streets and roads, fire and police protection, and many other public services in Teton County.

Visitors paid **56.3%** of all sales tax collections in Teton County.



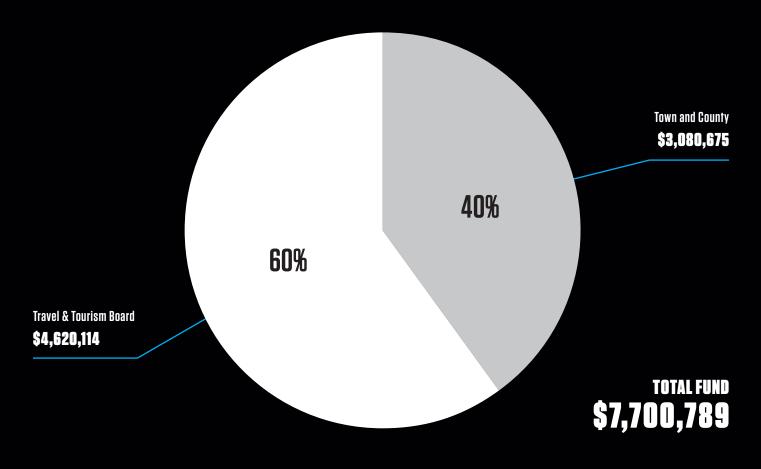


If not for the taxes generated by the travel and tourism industry, the average household in Teton County would have had to pay **\$7,103** more in taxes for existing government services. In 2019, travelers generated **8,860 jobs** in Teton County.

Travelers supported **26.7%** of Teton County's total private industry employment. Without the jobs generated by the travel industry, the 2018^{*} Teton County unemployment rate of 3% would have been **29.7%**.

*THIS STATISTICS REFLECTS A ONE-YEAR LAG DUE TO REPORTING TIME FROM THE BUREAU OF LABOR STATISTIC.

SOURCES: DEAN RUNYAN ASSOCIATES, TRAVEL IMPACT REPORT, MARCH 2020; U.S. Bureau of Economic Analysis; U.S. Bureau of Labor Statistics; Wyoming Dept. of Revenue; Wyoming Dept. of A&I, Division of Economic Analysis. The lodging tax is a 2% tax that is added to a visitor's stay in any Teton County hotel, motel or rental property. It was voted in by residents of Teton County in November 2010. Dubbed the "tax you don't pay," this money is collected from tourists visiting the valley. The Jackson Hole Travel & Tourism Joint Powers Board is responsible for allocating 60% of the collected funds. Teton County and the town government are responsible for allocating the remaining 40% of funds collected.



THE 60/40 SPLIT IS DETERMINED AT THE STATE LEVEL. ALL OTHER COUNTIES HAVE A 90/10 SPLIT, where 90% of funds go toward promotion and 10% of funds go toward visitor impact. These collections are provided by teton county and reflect a two-month lag.

WHAT TOURISM MEANS FOR US

FOR OUR COUNTY

PUBLIC SAFETY

In FY 2020, \$150,000 of the revenue from the lodging tax to Teton County was expended for the general operations of the Jackson Hole Fire/EMS Department. The mission of the Jackson Hole Fire/EMS is the protection of life and property from the adverse effects of fires and medical emergencies, and exposure to manmade and/or natural dangerous conditions.

PARKS AND RECREATION

In FY 2020, \$355,000 of the revenue from the lodging tax to Teton County was expended for the general operations of the parks and recreation department. This funding provided support for activities, including, but not limited to, snow plowing, trash pickup, and general park cleaning and maintenance.

PUBLIC TRANSPORTATION

In FY 2020, nearly \$912,865 of the revenue from the lodging tax to Teton County supported the general operations of the START bus system, as well as bus transportation to Grand Targhee. This includes \$305,556 in additional capital spending and \$174,728 for the Green Line expansion which provides increased service from Jackson to Teton Village during the summer season. These systems provide local and regional transportation services to both residents and visitors.

JACKSON HOLE HISTORICAL SOCIETY AND MUSEUM

In FY 2020, \$137,500 of the revenue from the lodging tax to Teton County was expended for the general operations of the Historical Society and Museum, which collects, preserves and explores the region's rich history and creates educational programs to preserve and promote the unique character of Jackson Hole.

GLOBAL TIES WYOMING

In FY 2020, \$6,000 of the revenue from the lodging tax to Teton County was expended for general operations of Global Ties Wyoming, an organization that brings international dignitaries to Teton County to meet with elected officials and organizations about government and tourism.

GRAND TARGHEE

Grand Targhee was awarded a grant of \$43,500.

GENERAL FUND

In FY 2020, \$411,642 of the revenue from the lodging tax to Teton County was expended for general use to projects geared toward visitor impact such as the sheriff's office, dispatch centers and Pathways — support for asphalt repairs, wayfinding signage, pathway benches, and general maintenance.

FOR OUR TOWN

TRANSPORTATION

In FY 2020, roughly 73% of the income received by the town of Jackson through the lodging tax was used to fund the START system.

PARKS AND PATHWAYS

In FY 2020 \$175,575 of the income received by the town of Jackson through the lodging tax was used to maintain or improve Jackson/Teton County parks and pathways.

PUBLIC SAFETY

In FY 2020, \$105,345 of the income received by the town of Jackson through the lodging tax was allocated to this nonrestricted fund.



SOUTHERN TETON AREA RAPID TRANSIT (START)



HISTORICAL SOCIETY



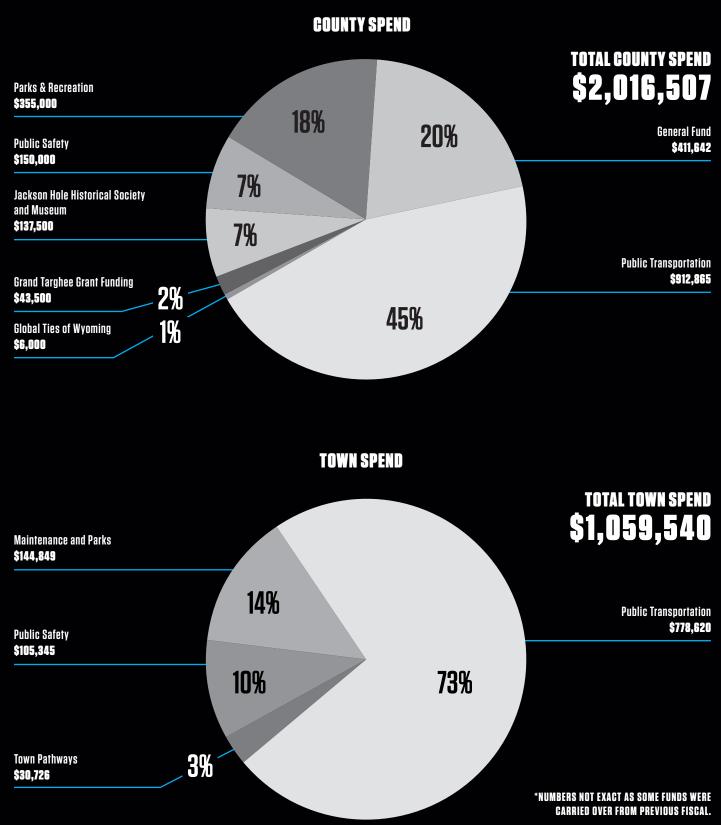
JACKSON HOLE FIRE/EMS DEPARTMENT

Teton County and the town of Jackson are responsible for 40% of the funds collected annually from the countywide 2% lodging tax.

The town and county split this 40% based on point of sale. The town's portion of this income is then split into a restricted fund (75%) and a general fund (25%).

The revenue from the lodging tax is used primarily to address the impact that millions of visitors have each year on our community, but it's also reinvested into Teton County. These funds help build a sustainable economic force and high quality of life for our residents.

COUNTY & TOWN Spending*



¹¹

JACKSON HOLE TRAVEL & TOURISM BOARD MEMBERS 2019

BRIAN GALLAGHER

Joined the Board in 2016 Chairman CityPASS

CORY CARLSON

Joined the Board in 2017 Vice Chairman Four Seasons Resort and Residences Jackson Hole

ERIK DOMBROSKI

Joined the Board in 2018 Treasurer The Yarrow Group

BRIAN MODENA

Joined the Board in 2016 Secretary TMBR Creative Agency

WILLI BROOKS

Joined the Board in 2017 Center for the Arts

CRISTA VALENTINO

Joined the Board in 2017 Current, LLC

JOE MADERA

Joined the Board in 2019 In Group Hospitality

JACKSON HOLE TRAVEL & TOURISM BOARD SUPPORT

KATE SOLLITT

Executive Director Joined 2012 JHTTB

MAUREEN MURPHY

Event Liaison Jackson Hole Chamber of Commerce

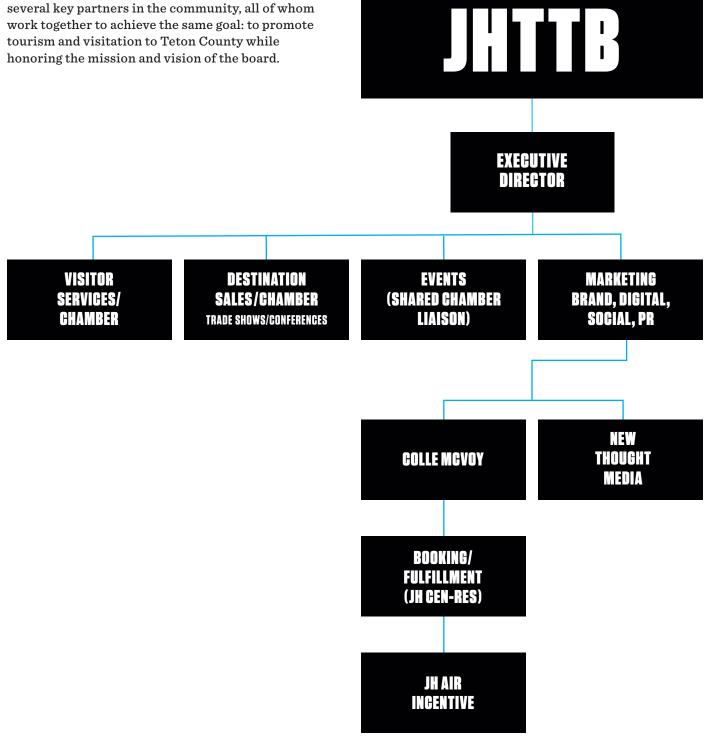
PARTNER ORGANIZATIONS

Jackson Hole Chamber of Commerce

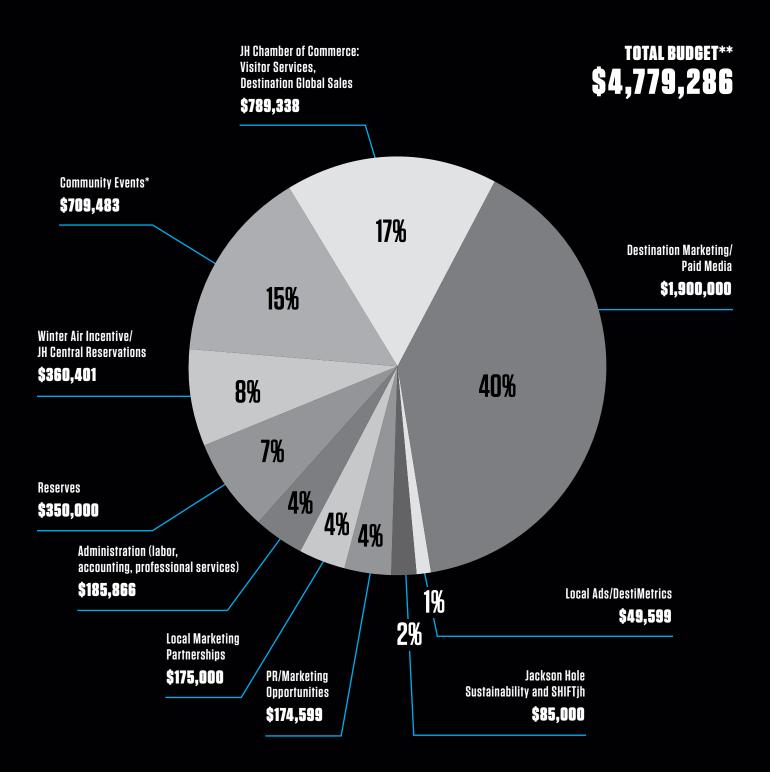
Jackson Hole Central Reservations Jackson Hole Air

JHTTB PARTNERS

The Jackson Hole Travel & Tourism Board relies on several key partners in the community, all of whom work together to achieve the same goal: to promote



FY 2020 JHTTB Budget Breakdown



*INCLUDES COMMUNITY EVENT COORDINATOR.

**BUDGET SLIGHTLY HIGHER THAN COLLECTIONS DUE TO EXCESS COLLECTIONS CARRIED OVER FROM PREVIOUS YEARS.



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TETON COUNTY SEARCH AND RESCUE

RESPONSIBLY WILD: CLEAN, CAREFUL, CONNECTED

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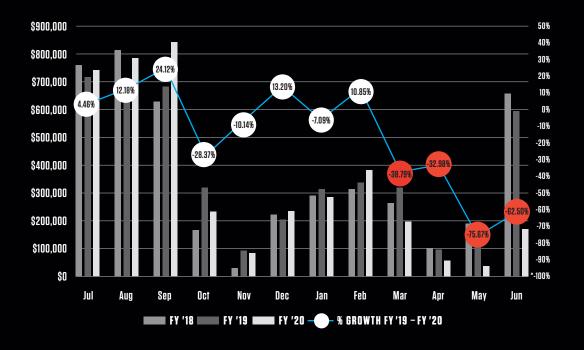
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JHTTB LODGING TAX Receipts

Month	FY '18	FY '19	FY '20	% Growth FY '17-FY '18	% Growth FY '18- FY '19	% Growth FY '19- FY '20
July	\$756,692.47	\$716,556.41	\$748,540.87	8.87%	-5.30%	4.46%
August	\$808,700.01	\$695,339.54	\$780,037.15	23.91%	-14.02%	12.18%
September	\$631,843.45	\$682,496.27	\$847,088.44	11.15%	8.02%	24.12%
October	\$162,461.40	\$321,445.04	\$230,259.39	17.86%	97.86%	-28.37%
November	\$39,833.63	\$89,904.71	\$80,786.32	38.95%	125.70%	-10.14%
December	\$225,544.01	\$204,404.67	\$231,383.75	-2.86%	-9.37%	13.20%
January	\$289,662.30	\$308,278.95	\$286,428.74	31.07%	6.43%	-7.09%
February	\$311,313.63	\$341,078.00	\$378,096.17	37.61%	9.56%	10.85%
March	\$262,295.72	\$318,747.78	\$195,108.64	10.37%	21.52%	-38.79%
April	\$101,285.99	\$95,625.76	\$64,086.17	210.74%	-5.59%	-32.98%
May	\$194,369.92	\$185,656.58	\$45,164.94	-2.28%	-4.48%	-75.67%
June	\$658,053.09	\$592,641.44	\$222,251.87	7.28%	-9.94%	-62.50%
Total	\$4,442,055.62	\$4,552,175.15	\$4,109,232.45	15.54%	25.00%	-\$9.73%

JHTTB Lodging Tax Receipts



RED INDICATES IMPACT FROM COVID-19

THESE TAX RECEIPTS REPRESENT ONLY THE JHTTB PORTION AND ARE ACTUAL ADJUSTED NUMBERS.

JHTTB MISSION & VISION

Our mission: To effectively spend lodging tax funds to promote travel and tourism to Teton County in a manner that is consistent with the shared values of our community. Our contributions will reflect stewardship of our natural resources, highlight our outstanding assets and amenities, and strive toward sustainability.

Our vision: As a world leader in responsible tourism, the JHTTB is dedicated to developing a healthy and vibrant fall, winter and spring economy that preserves our natural capital and enhances the well-being of our community. "Thanks to the marketing support of the JH Travel & Tourism Board, the JH Nordic Alliance is able to host its popular annual Free Nordic Ski, Fat Bike & Snowshoe event at Turpin Meadow Ranch for our entire community and visitors to try new and favorite activities on our winter trails and public lands. One of winter's favorite events!"

- NANCY LEON, JH NORDIC ALLIANCE

PARTIALLY FUNDED BY THE LODGING TAX

4TH ANNUAL NORDIC SKI AND FAT TIRE BIKE EVENT

A COMMUNITY We support

Slow Food

















THEATRE

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WOMEN IN WILDLIFE PHOTOGRAPHY SYMPOSIUM MCKSONHOLE













"The JH Travel & Tourism Board's support has been a key factor in the Jackson Hole Ski & Snowboard Club's (JHSC) ability to fulfill our mission. Their sponsorship of our Early Season Training & Events, Junior Events Series, and legacy fundraising events (Jackson Hole Downhill & Karen Oatey Pole Pedal Paddle) has allowed us to extend the reach of our marketing campaigns to regional and national audiences annually, resulting in thousands of visitors and over \$2.7M* into the Jackson Hole economy, plus added financial support for the JHSC."

– JEFF MORAN, CMO, JACKSON HOLE SKI & SNOWBOARD CLUB



TRAIL CREEK NORDIC CENTER



SNOWBOARDER AT JHMR



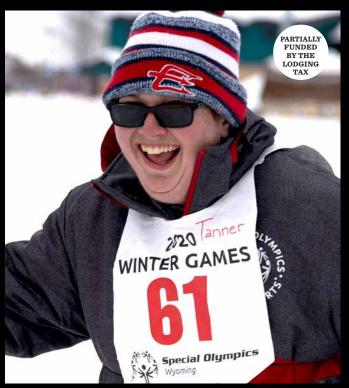
JACKSON HOLE DOWNHILL

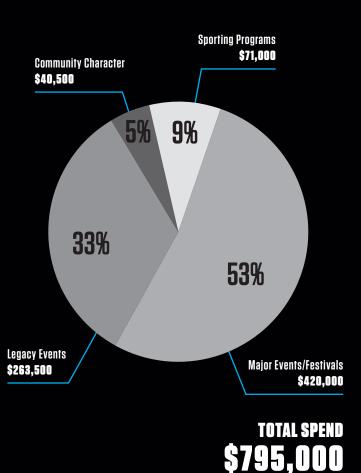
*THESE AMOUNTS ARE BASED ON THE FORMULA USED BY U.S. SKI & SNOWBOARD'S ECONOMIC IMPACT CALCULATOR, WHICH states the total economic impact to an area from an event is on average 1.6 times the actual tracked amount.

JHTTB-FUNDED Community events

"The Special Olympics Wyoming Winter Games is an opportunity to showcase the abilities of our winter sports athletes in one of the best venues in the country. While competition is our core mission, something far greater happens: learning, understanding, accepting, and including athletes with disabilities from across Wyoming and the region. Funding from the lodging tax gives us momentum and additional motivation to promote and focus on spreading the word. Our organization strives to include more participants, more volunteers and a greater audience; this funding is helping us get there. Thank you."

– PRISCILLA DOWSE, PRESIDENT & CEO, SPECIAL OLYMPICS WYOMING





SPECIAL OLYMPICS WYOMING WINTER GAMES

Shoot Like a Girl Women's Symposium	Teton Photography Club	\$1,500
Teton County Model United Nations Conference	Teton County School District	\$1,500
A Chorus Line	Off Square Theater	\$3,000
Culinary Conference	Central Wyoming College	\$3,000
Veterans Classic	Jackson Youth Basketball	\$3,000
Women in Leadership Summit	Womentum	\$3,000
World Above the Tetons	Wyoming Stargazing	\$3,000
Wild Science Festival	Center of Wonder/JH Wild	\$3,000
Wildlife Film Festival Community Filmmaker Talks	Center of Wonder/JH Wild	\$3,000
15th Annual Fall Classic	JH Youth Soccer	\$10,000
Stickum UP	Public Art	\$10,000
Wyoming Snow and Avalanche Workshop	TCSAR	\$15,000
Early Season Training	Jackson Hole Ski and Snowboard Club	\$20,000
SHIFT	Center for Jackson Hole	\$85,000
JH Winter Wonderland	Grand Teton Skating Club	\$1,500
People's Market	Slow Food in the Tetons	\$1,500
The Lion, the Witch and the Wardrobe	Dancer's Workshop	\$3,000
Feathered Fridays	Teton Raptor Center	\$3,000
Mountains to Manuscripts	Jackson Hole Historical Society and Museum	\$3,000
Who Dunnit?	Art Association of Jackson Hole	\$3,000
Arc'teryx Academy	Backcountry Ski and Snowboard	\$5,000
Special Olympics	Wyoming Special Olympic	\$5,000
4th Annual Ski/Fat Tire Bike Event	JH Nordic Alliance	\$5,500
Triple Crown Race Series	Jackson Hole Ski and Snowboard Club	\$15,000
Junior Event Series	Jackson Hole Ski and Snowboard Club	\$20,000
Pedirgree Sled-Dog Race	Pedigree State Stop	\$25,000
44th Annual Hill Climb*	Snow Devils	\$30,000
Jackson Hole Winter Fest*	JH Food and Wine	\$50,000
JH Rendezvous Festival*	JHMR	\$360,000
Spring People's Market	Slow Food in the Tetons	\$1,500

FALL TOTAL \$164,000

WINTER TOTAL \$530,500

SPRING

WINTER

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NG -	Grand Opening Celebration	Astoria Hot Springs Park	\$3,000
	Backcountry Adventure Workshop	TCSAR	\$7,500
	Old West Days*	JH Chamber of Commerce	\$88,500

SPRING TOTAL \$100,500

RED INDIGATES IMPACT FROM GOVID-19 *These events were partially reimbursed to gover marketing expenses incurred.

TOTAL BUDGET \$795,000

CHAMBER OF COMMERCE SUPPORTED SERVICES

VISITOR SERVICES LOCATIONS (4)

Jackson Hole and Greater Yellowstone Visitor Center Total visits: 240,077 Summer: 46% / Shoulder seasons: 54%

Chamber of Commerce Main Office Total visits: 12,196 Summer: 55% / Shoulder seasons: 45%

Jackson Hole Airport Total visits: 84,100 Winter: 100%

Home Ranch Welcome Center Total visits: 79,539 Summer: 69% / Shoulder seasons: 31%

Hotel referrals: 19,418 Summer: 42% / Shoulder seasons: 58%

Inquiry emails: 22,260

Inquiry phone calls: 5,536

EVENTS DEPARTMENT

Facilitate the process of the event grant cycles

Coordinate event managers from Travel and Tourism Board–sponsored events to maximize marketing efforts and exposure

Work with the sub-committee for special events to coordinate and facilitate event festival periods, including January through May and October through December

DESTINATION GLOBAL SALES

Provide destination representation at 18 major trade shows domestically and internationally for individual and group businesses

Provide opportunities for local businesses to participate in tradeshows

Support PR events in international markets in conjunction with local businesses

Facilitate face-to-face interaction with travel writers, travel agents, tour operators, meeting planners and consumers worldwide

Oversee visiting travel writers, tour operators and meeting planners; create itineraries and experiences based on their focus to better educate them about the offerings and opportunities that exist in Teton County

Conduct over 575 meetings and interact with more than 1,100 consumers annually worldwide

Focus on promoting winter, fall and spring months



VISITOR GENTER



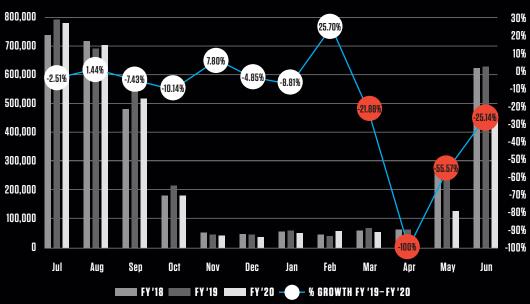
VISITOR CENTER



JACKSON HOLE CHAMBER OF COMMERCE DESTINATION SALES

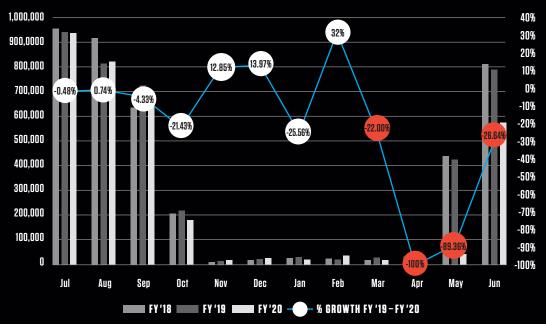


NATIONAL PARK Visitation



Grand Teton National Park Recreation Visitation

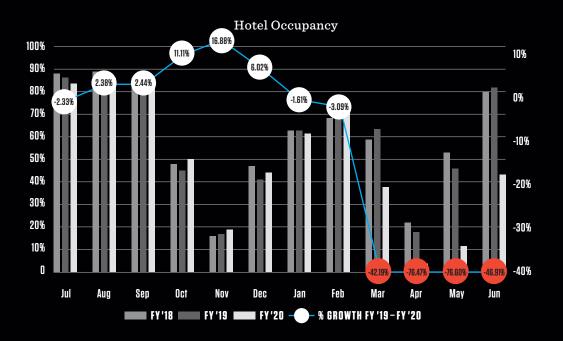
Yellowstone National Park Recreation Visitation



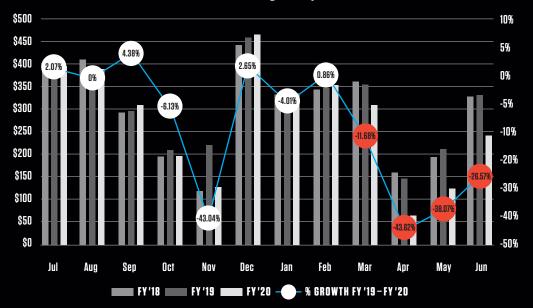
RED INDICATES IMPACT FROM COVID-19

PARKS CLOSED MARCH 24, 2020. BOTH YELLOWSTONE NATIONAL PARK AND GRAND TETON NATIONAL PARK BEGAN A GRADUAL REOPENING ON MAY 18, 2020. Source: Irma.NPS.Gov

HOTEL OCCUPANCY AND AVERAGE DAILY RATE



Hotel Average Daily Rate



RED INDICATES IMPACT FROM GOVID-19 Jackson Lake and Jenny Lake Lodge Closed for the 2020 summer season. Yellowstone hotels in teton county had a gradual opening and did not open UNTIL MID TO LATE JULY 2020. NUMBERS ADJUSTED MONTHLY BASED ON REPORTING. SOURCE: DESTIMETRICS



A CHORUS LINE



JACKSON HOLE FOOD AND WINE



PEOPLE'S MARKET

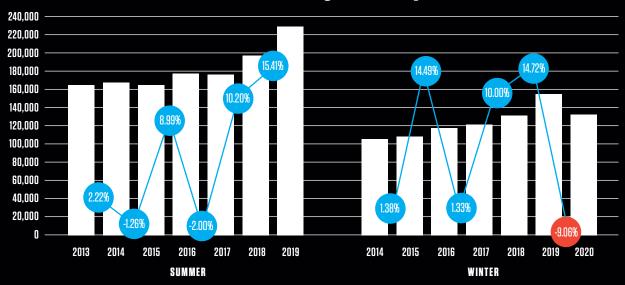


4TH ANNUAL SKI/FAT TIRE BIKE EVENT

INBOUND PASSENGERS By Season



12 NONSTOP FLIGHTS FROM AROUND THE COUNTRY



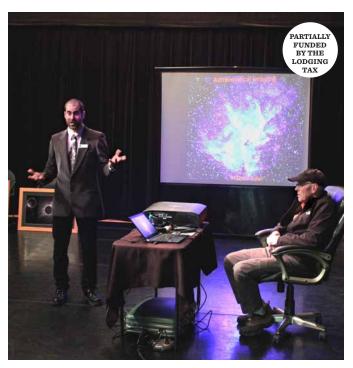
Inbound Passengers at JH Airport

RED INDIGATES IMPACT FROM COVID-19 Source: JH Air



SHOOT LIKE A GIRL PHOTOGRAPHY SYMPOSIUM





WORLD ABOVE THE TETONS WYOMING STARGAZING

TURPIN FREE SKI DAY

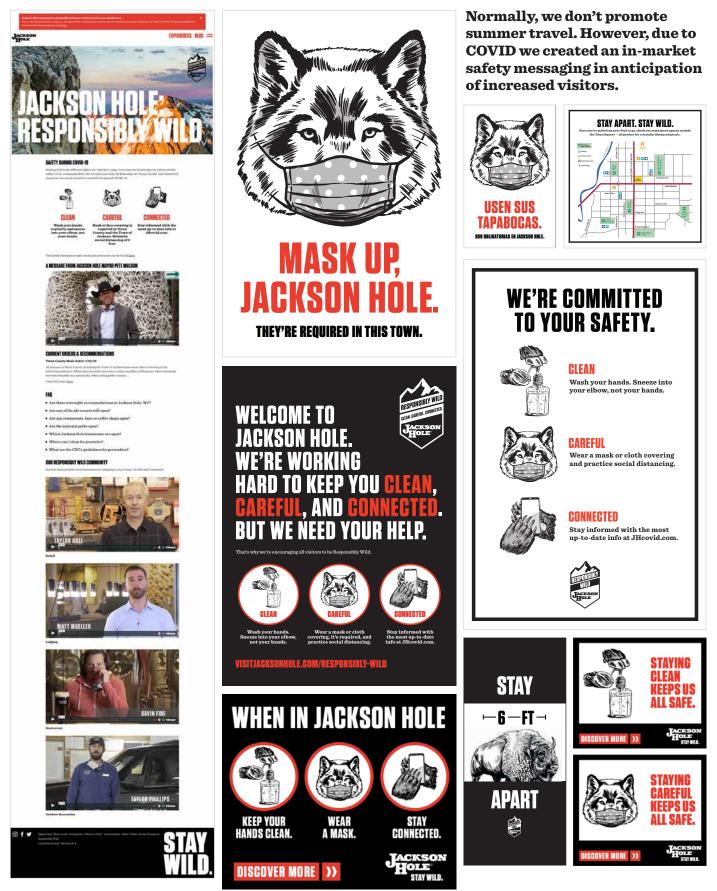
CAMPAIGN VISUALS & STATS

Winter 19–20 Campaign



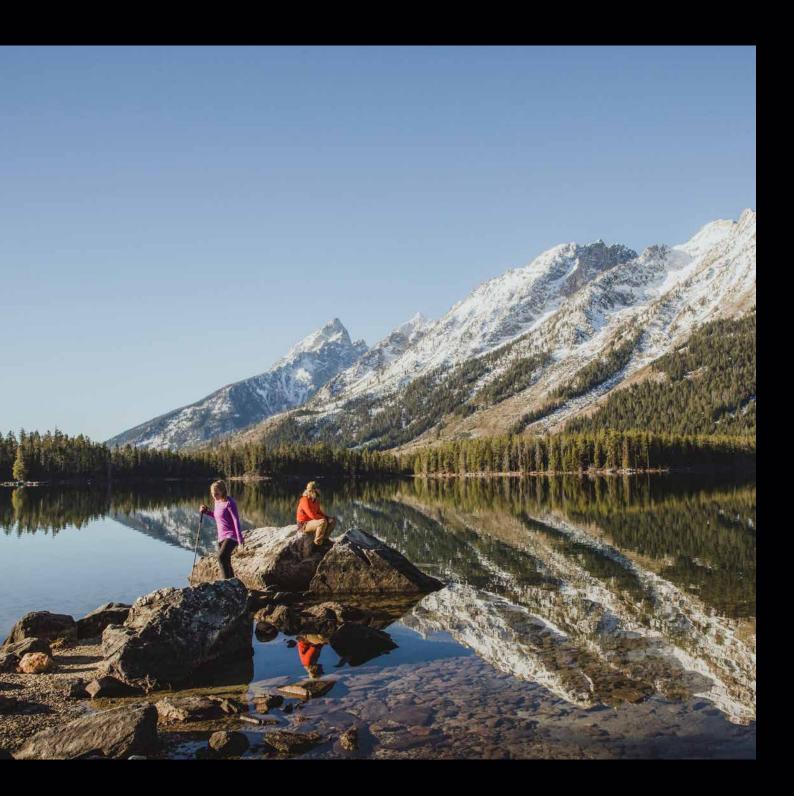
TOTAL SOCIAL MEDIA FANS, ADDING 19,425 SINCE 4/1/19

TAG RESPONSIBLY FREE MEDIA IMPRESSIONS









4JacksonHole.org

